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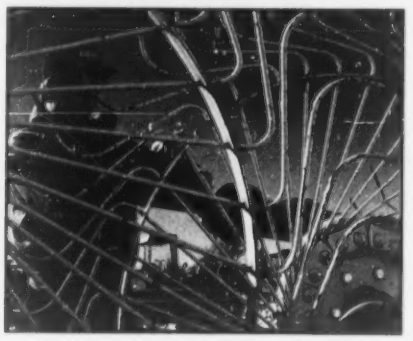
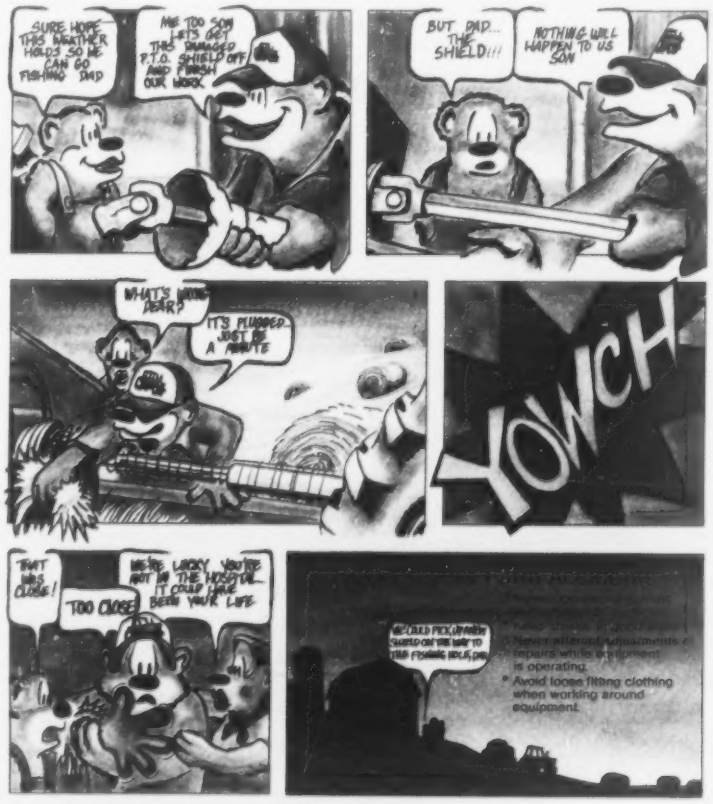
PRE-SETTING VITAL TO SUCCESSFUL DEMOS

IMPLEMENT & TRACTOR

The Business Magazine of the Agricultural, Industrial & Outdoor Power Equipment Industry



VOLUME 105 No. 4 APRIL 1990


SURE HOPE THIS WEATHER HOLDS SO WE CAN GO FISHING DAD
ME TOO SON LET'S GET THIS DAMAGED P.T.O. SHIELD OFF AND FINISH OUR WORK
BUT DAD... THE SHIELD!!!
NOTHING WILL HAPPEN TO US SON
WHAT'S WRONG DEAR?
IT'S PLUGGED. JUST BE A MINUTE
YOWCH
THAT WAS CLOSE!
TOO CLOSE!
WE'RE LUCKY YOU'RE NOT IN THE HOSPITAL. IT COULD HAVE BEEN YOUR LIFE
Never attempt adjustments or repairs while equipment is operating.
Avoid loose fitting clothing when working around equipment.

Driveline Group Offers Safety Poster

PTO safety is promoted in this Pogo-like poster developed by the Agricultural Driveline Manufacturers Assn. ADMA members (Bondioli & Pavesi, G&G Mfg. Co., Neapco, Rockwell International, Walterscheid and Weasler Engineering) want to get the poster into dealerships and farm homes. For more information, contact Joel Martin (Walterscheid) at 708-887-7022. □

For Agriculture's Future

Opinions Differ, Goals Are Same

STAFF REPORT

THE ROOM was packed with people from the equipment industry, the farm chemical industry and ag schools. You might have expected a donnybrook of insults, sloganeering and cheap shots, but what you got were some thoughtful calls for reasoned change.

The venue was Moline, Ill., where the Equipment Manufacturers Institute was conducting its recent Tillage & Crop Production Equipment Conference. The event drew about 130 persons, a fourfold increase over similar sessions of just a few years ago. Lamont Webster (Kewanee Farm Equipment Co.) was program chairman.

The two featured speakers of the first general session were Dr. Jack McEowen (United Suppliers) and Robert Rodale (Rodale Press). Moderator was Glenn Olson (Deere & Co).

Dr. Jack McEowen has a background in academia, agricultural association work and the farm chemical industry, but he insisted he is not

(See TWO, pg. 8)

Who's Marketing The Servicing Dealer?

By BILL FOGARTY

WHEN I HEARD Ben Lamp's report on the Ohio State LIDS research to date, I was jarred by some of the findings. (There's a report on that report elsewhere in this issue.)

LIDS is already a widely-known acronym for low inventory distribution system—the business whereby the customer orders through the dealer, *then* the specified machine is produced and delivered.

As part of finding out how to approach that way of doing business, the Ohio study looked into ways buying decisions are made and shopping is done today.

Perhaps I shouldn't have been jarred. What was happening was that some of my cherished personal beliefs about perceptions of dealers, farmers, products and manufacturers were being challenged.

My doctrine has always been that

COMMENTARY

the dealer is more important than the brand. It's not the paint color that keeps the machine going in a critical planting or harvesting season. It's the technician making the in-field repairs, the partsman having

(See WHO'S, pg. 4)

EMI Cuts Back Ag Sales Data, But...

THE EQUIPMENT Manufacturers Institute has a new policy with regard to public disclosure of its retail sales data reporting programs. Starting with the January flash report, the only numbers to be made available to other than reporting, participating companies will be:

Farm wheel tractors: Two-wheel-drive units of under 40 hp, from 40

(See EMI, pg. 2)

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Inside

DEPARTMENTS

INDUSTRY UPDATE	6
NEW TRACTOR GLIMPSES	19
HAY AND FORAGE NEWS	22
I&T MARKETPLACE	25

FEATURES

TWO VIEWS	1
MIZZOU TRAINING	7
LIGHT ON LIDS	10
DEALERS AND SHOWBIZ	12
MERGER-DRIVEN CHANGES	14
BALERS, HAY QUALITY	16
PRE-SETTING PAYS	18

IMPLEMENT & TRACTOR

The Business Magazine of the Agricultural, Industrial & Outdoor Power Equipment Industry

APRIL 1990
VOL. 105, NO. 4

IMPLEMENT & TRACTOR
Editorial, advertising and circulation correspondence should be addressed to: P.O. Box 1420, Clarksdale, Mississippi 38614. Telephone: 601/624-8503

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Subscription information: Implement & Tractor is edited for persons in the farm and industrial equipment industry who function in the areas of retail sales and service, distribution sales and service, marketing, engineering, financing, manufacturing and general management. Subscription prices: U.S. and Canada one year — $15, three years — $30. Single copies, $3.50, except Annual Statistical Number, $4; Product File issue, $8; Red Book issue, $8. Extra charge for service on back issues. Allow 6-8 weeks for change of address and new subscriptions. Foreign subscriptions: Air Mail only available. One year — $100; three years — $250 (U.S. currency).

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ISSN 0019-2953 $3.50 + 0.00

IMPLEMENT & TRACTOR (USPS 461-750, ISSN-0019-2953) is published monthly, except combined November/December issue, by Farm Press Publications, P.O. Box 1420, Clarksdale, Miss. 38614. Second class postage paid at Clarksdale, Miss., and additional mailing offices. POSTMASTER: Send Form 3579 to P.O. Box 1420, Clarksdale, Miss. 38614.

Farm Press Publications
A Division of Argus Press Holdings, Inc.

WHAT THEY'RE SAYING

Better Product Or Better Sales Person?

Peter Veevers is a veteran British sales trainer. Here's part of what he wrote recently for Tractor & Farm Machinery Trader, *a British trade publication.*

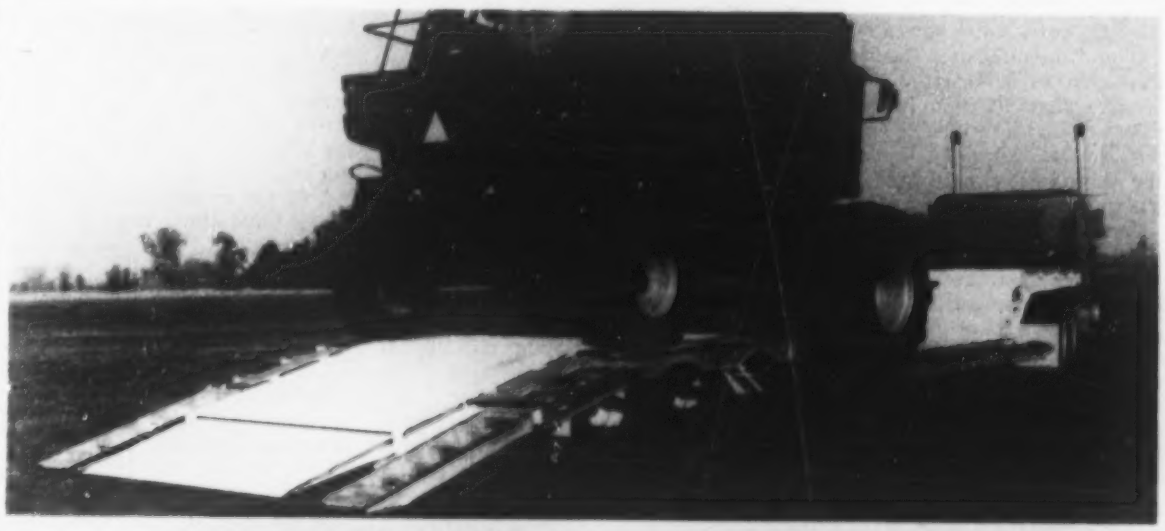
WHENEVER I SEE a top company salesperson selling two or three times the volume of his/her colleagues, I note that it is not what they are selling that makes the difference, as their colleagues are all selling the same product range.

What does make the difference is the knowledge, the skill and the working practices of those salespersons themselves. They do it better and more often. They prove that in spite of the product, price and company they work for, high levels of sales can be achieved. And in a shrinking market, too.

Why it never dawns upon the manufacturers that it is not their products but their dealers' salespeople who make the difference, I do not know. Well, I think I do know, actually.

It is because manufacturers are so obsessed with whether their product has a few extra horsepower, gears or ballbearings, they forget about, or

(See SAYING pg. 7)



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INDUSTRY UPDATE

Distributors Foresee Coming Changes

Associated Equipment Distributors, a group of retailers of construction and industrial equipment, are looking at major changes in their markets as customer needs shift.

AED members deal not only in large earthmoving equipment but such items as hand-held tools, generators and pumps. They heard about the changes from panelists at AED's recent annual meeting in Chicago.

Among the changes in traditional patterns of acquiring equipment that are impacting the industry:

Demand will continue to grow for smaller and medium-sized units because of a different composition of construction activity. Customers will also want equipment to perform multiple functions when possible.

Customers will show less brand loyalty and shop instead for product features, price and after-sale product support.

One-stop convenience for equipment, supplies and services will be in greater demand.

Customers are turning to rent and lease arrangements to acquire specialized machines for unusual applications and short-term assignments.

Panelists included: Brian Thompson, Blackwood Hodge plc, British parent company of a number of distributorships; Bram Bluestein, A.T. Kearney, Inc., consultant; David Reaid, Hudson Institute economist; Pat Dolan of Arthur Anderson & Co. accountants; and Frank Manfredi, marketing consultant.

Tractor, Combine Sales Strong Through February

Retail sales of farm tractors and combines in the U.S. were up in all but one category through the first two months of 1990. Sales of tractors under 40 hp, which had been in decline for several years, were running almost dead even with 1989 through Feb. 28.

The data source is the Equipment Manufacturers Institute, which has previously announced that its only publicly released sales figures will be its monthly flash report on tractors and self-propelled combines. The flash report no longer includes data on hay balers, forage harvesters or mower-conditioners. Some tractor and combine inventory data may be included in later reports.

U.S. - UNIT RETAIL SALES

Equipment	February 1990	February 1989	% Change	January-February 1990	January-February 1989	% Change
Farm Wheel Tractors:						
2-Wheel Drive						
Under 40 HP	2,174	2,221	(2.1)	4,450	4,451	(.0)
40 & Under 100 HP	2,304	2,148	7.3	4,733	4,325	9.4
100 HP & Over	1,600	1,341	19.3	3,320	3,044	9.1
Total 2-Wheel Drive	6,078	5,710	6.4	12,503	11,820	5.8
Total 4-Wheel Drive	327	289	13.1	647	559	15.7
Total Farm Wheel Tractors	6,405	5,999	6.8	13,150	12,379	6.2
Combines (Self-Propelled)	481	196	145.4	985	561	75.6

French Tractor Market, Who Has What Share

In 1989, France's state-owned tractor line, Renault Agriculture, took the share lead in the French market away from FiatGeotech, holding its 15.5 percent slice. Total units sold in France in 1989 came to 39,707, compared with 42,492 in 1988.

Here's how the major sellers ranked in new tractor registrations, according to SYGMA, an association of French farm equipment makers:

Company	Unit Sales 1989	Unit Sales 1988	Share of Market (%) 1989	Share of Market (%) 1988
Renault	6,142	6,601	15.5	15.5
Case IH	5,922	5,866	14.9	13.8
FiatGeotech	5,534	6,936	13.9	16.3
Massey*	5,379	5,231	13.5	12.3
John Deere	4,213	4,138	10.6	9.7
Ford NH	2,688	3,082	6.8	7.3
Deutz	2,044	2,122	5.1	5.0
Same	1,376	1,633	3.5	3.9
Others	6,409	6,884	16.2	16.2
Total	39,707	42,492	100.0	100.0

*Massey-Ferguson includes Landini

Allied Expects 1989 Loss

Allied Products Corp. has announced it expects to report a loss for 1989 of about $22 million, of which about $12 million is of a nonrecurring nature. Richard Drexler, president and chief executive officer, said the loss stemmed partly from weakened demand in transportation-related sectors of the business and "a slower than expected improvement in the sales of agricultural equipment."

Allied is the parent company of White-New Idea Farm Equipment Co., Coldwater, Ohio. Farm equipment accounts for approximately half of Allied's sales volume.

Earlier, Allied announced it has restructured its existing bank debt with an 18-month secured credit facility in excess of $200 million.

MF Opens Regional Centers

Massey-Ferguson, Inc., has established seven regional operations centers across North America. The manager of each center will report directly to David Pitt, president of MF Inc., and will have asset and profit responsibility for operations. These will include marketing and sales planning, wholegoods and parts sales, telemarketing, field service, dealer development, product scheduling, pricing, training, promotion, collections, etc.

The regions and their general managers:

Western Canada, Calgary, Alta.; Jerry Knight.

Eastern Canada, Toronto, Ont.; Donald Butler.

(See MF, pg. 20)

BRIEFLY...

Kubota Tractor Co. is offering financing rates beginning at 2.5 percent until June 30, 1990, through Kubota Credit Corp. Buyers of new Kubota tractors and implements can get a two-year contract at 2.5 percent, three years at 5.5 percent, four years at 7.5 percent or five years at 8.5 percent.

Pegoraro-Fort, Inc. has been established at Atlanta, Ga., as a joint subsidiary of two Italian farm equipment makers, Pegoraro of Gambellara and Fort of Luzzara. The Pegoraro line includes powered tillage equipment; Fort produces round balers, drum and disk mowers, tedders and rakes. Guido Gabbrielli is manager.

Case Plans New Racine Facility

With approval from parent company Tenneco's board of directors, J I Case is starting construction of a new training center and corporate headquarters at Racine.

Completion of the 30,000-sq.-ft. facility is set for 1991 and is the first Case construction in downtown Racine in over 85 years.

Though not yet approved by the board, there are plans for further construction in the area that would give Case 500,000 sq. ft. of new working space surrounded by landscaped plazas and connected by enclosed walkways.

The facilities would house 1,500 Case workers now located around the Racine area.

How Big Is The Industry?

STAFF REPORT

ARMED WITH with the table you see, courtesy of the Dept. of Commerce, we thought we could find an expert to answer our headline question in its broad sense. We couldn't, as it turned out. A lot of people know a lot of separate elements of the industry's business, but apparently nobody has it all.

We wanted to get a fix on how much retail farm equipment business is done in the U.S. That's parts, new wholegoods, etc., at the dealership level. After thinking it over, we realized that these elements are just a part of the business. There's used equipment, also repair services. And there's also the sale of financial services.

Let's look at the 1988 number: $7,134 billion as a value of shipments. That's an FOB factory figure. Add in the imports and subtract out the exports and you get $7.43 billion.

At this point, let's turn to the *Cost of Doing Business* study of the North American Equipment Dealers Assn. Their reporting ag dealers averaged $2.72 million in sales. There were 7,975 dealer members in 1988. If you figure that 88 percent of them are ag dealers (that was the percentage of all reporting dealers that year), that's 7,000. Multiply $2.72 million times 7,000 and you get $19,312 *billion*, and right away we feel we're off somewhere. It seems like too much.

So subtract everything from the total average sales figure except new equipment and repair parts, which is what the Commerce Dept. shipments figure includes. That leaves $1.83 million times 7,000, or $12.8 billion. Dealers paid their suppliers an average $1.35 million for those new wholegoods and parts, which multiplied by 7,000 ag dealer members is $10.88 billion.

Our quest for the real number, then, depends on how good a sample the 901 reporting ag dealers are of the estimated 7,000 ag-oriented members NAEDA had in 1988.

So how big is the retail end of this business? If we want to include used equipment and other related items, maybe that $19.3 billion figure is only slightly exaggerated.

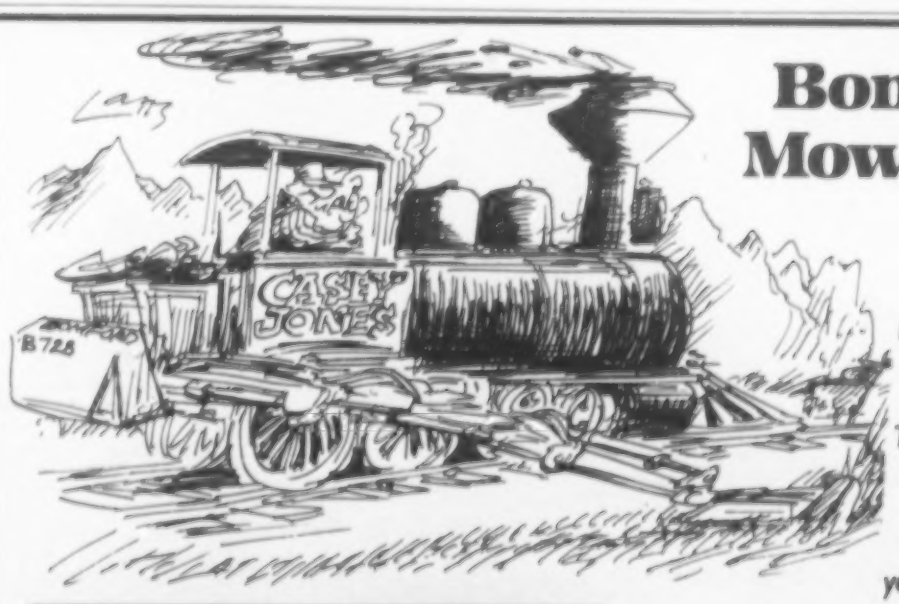
But even then, we are leaving out two important elements. One is replacement parts that are not shipped to the agricultural market by original equipment manufacturers but by other vendors. Another element is the retail finance volume generated by the sales of everything—new and used wholegoods, repair services, rentals and parts. □

Shipments Of Farm Equipment

(In millions of dollars except as noted)

Item	1987[1]	1988[2]	1989[3]	1990[4]	Percent Change 1987-88	1988-89	1989-90
Industry Data							
Value of shipments[5]	6,872	7,134	7,724	8,198	3.8	8.3	6.1
Value of shipments (1987$)	6,872	6,940	7,287	7,535	1.0	5.0	3.4
Total employment (000)	56.9	57.0	58.1	58.9	0.2	1.9	1.4
Production workers (000)	39.0	39.1	39.9	40.5	0.3	2.0	1.5
Average hourly earnings ($)	11.23	11.30	11.40	–	0.6	0.9	–
Product Data							
Value of shipments[6]	6,390	6,636	7,253	7,742	3.8	9.3	6.7
Value of shipments (1987$)	6,390	6,455	6,842	7,116	1.0	6.0	4.0
Trade Data							
Value of imports	1,835	2,207	2,375	2,518	20.3	7.6	6.0
Value of exports	1,580	1,911	2,315	2,547	20.9	21.1	10.0

[1]Industry and product data are preliminary. Trade data are adjusted to conform to the 1987 SIC. [2]Estimated, except for exports and imports. [3]Estimated. [4]Forecast. [5]Value of all products and services sold by establishments in the farm machinery and equipment industry. [6]Value of products classified in the farm machinery and equipment industry produced by all industries.
SOURCE: U.S. Department of Commerce: Bureau of the Census; International Trade Administration (ITA). Estimates and forecasts by ITA.



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Tel. No. 404 934 5282
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Ten-Year Summary of Test Reports, 1980-1989

MAKE AND MODEL OF TRACTOR	Test No.	Fuel Used	Weight With Ballast	Lbs. Ballast Carried	ENGINE No. of Cylinders	Bore and Stroke	Displacement Cu. in.	Rated RPM	Max. PTO HP at Rated Engine RPM	Std. PTO RPM	Max. PTO HP Std. PTO RPM	Max. Drawbar HP	MPH at Max. Dwbr. HP	Max. Lbs. Pull	FUEL CONSUMPTION (HP Hours Per Gallon) at:- Max. PTO HP at Std. PTO RPM	PTO Average at Varying Power	—Varing Drawbar Power— Max. Available Power	75% of Pull Max. Power	50% of Pull at Max. Power
835 Series 3 12 Speed SN. 835-83-036769 & higher	1482	Die.	27980	3595	6	5.50x6.00	855	2100	200.30	1009	200.30	181.14	5.34	25687	15.82	11.86	14.45	12.74	10.45
836 Manual	1566	Die.	25960	1300	6	4.921x5.354	611	2100	192.54	1008	192.54	170.56	4.83	24123	17.71	13.80	15.59	14.11	11.99
836 Powershift	1567	Die.	25995	1535	6	4.921x5.354	611	2100	181.04	997	181.04	161.45	6.77	24723	16.65	12.56	14.80	13.34	11.24
856 Powershift	1568	Die.	28000	2920	6	4.921x5.354	611	2100	209.28	997	209.28	185.04	5.88	26479	17.24	13.22	15.35	13.59	11.40
875 Series 3 12 Speed SN. 875-83-057906 & higher	1483	Die.	29500	3870	6	5.50x6.00	855	2100	252.67	1008	252.67	227.48	5.65	26725	16.82	13.06	15.25	13.73	11.82
876 Manual	1569	Die.	29500	4540	6	4.921x5.354	611	2100	---	---	---	233.92	6.53	27703	---	---	16.85	15.68	13.65
895 12 Speed	1335	Die.	32500	7880	6	5.50x6.00	855	2100	---	---	---	261.63	6.45	29402	---	---	15.15	13.72	11.57
936 Manual	1570	Die.	32385	5260	6	5.50x6.00	855	2100	---	---	---	260.45	6.78	29495	---	---	15.47	14.04	12.09
1150 8 Speed	1462	Die.	46500	11360	6	6.25x6.25	1150	2100	---	---	---	400.29	5.92	43219	---	---	15.84	14.64	12.35
White																			
2-30 8 Speed	1373	Die.	3853	848	3	3.386x3.386	91.4	2600	28.33	540	24.50	25.81	8.35	2816	12.03	10.27	10.77	11.42	9.61
2-35 8 Speed	1374	Die.	3970	800	3	3.386x4.02	108.4	2400	32.84	540	30.94	30.37	8.00	2978	12.68	10.86	11.23	11.73	10.35
2-45 20 Speed	1395	Die.	6630	660	4	3.858x3.62	169.3	2250	43.73	540	36.62	37.32	3.97	4455	12.70	11.25	10.96	11.00	9.66
2-55 16 Speed	1466	Die.	7055	860	4	4.02x3.94	199.4	2200	53.32	540	45.74	48.49	4.88	5037	14.89	12.38	13.35	13.21	11.39
2-62 20 Speed	1396	Die.	6875	635	4	4.016x4.33	219	2200	61.46	540	54.25	51.63	6.05	4695	16.31	13.85	13.76	13.49	12.08
2-65 16 Speed	1467	Die.	7110	790	4	4.02x4.65	235	2200	62.50	540	55.40	56.67	6.51	4827	16.19	12.91	13.94	13.20	11.29
2-75 16 Speed	1486	Die.	9625	1705	6	4.016x4.33	329	2200	75.39	1000	75.64	65.05	6.04	6487	15.86	12.02	13.01	12.21	10.48
2-88 18 Speed	1487	Die.	13615	0	6	3.875x5.00	354	2200	86.78	1007	86.78	74.67	6.51	9486	15.71	12.69	13.62	12.74	10.79
100	1614	Die.	14485	545	6	4.02x4.72	359	2400	94.36	1000	93.48	82.57	5.97	13629	14.97	11.86	12.77	11.88	10.15
2-110 18 Speed	1468	Die.	13955	0	6	3.875x5.00	354	2200	110.52	1007	110.52	94.90	6.40	9500	16.77	13.27	14.19	13.08	10.84
120	1615	Die.	15315	850	6	4.02x4.72	359	2200	119.13	1000	121.94	104.69	6.62	14286	16.94	13.11	14.76	13.57	11.49
140	1616	Die.	15665	1000	6	4.02x4.72	359	2200	138.53	1000	140.30	125.01	6.17	15060	17.49	14.29	15.39	14.58	12.62
160	1607	Die.	18850	1560	6	4.49x5.32	504.5	2200	162.47	1000	165.97	142.74	6.24	18055	17.78	14.36	15.45	14.34	12.29
4-175 Field Boss	1375	Die.	20420	0	8	4.50x5.00	636	2600	151.69	1000	151.29	133.72	6.39	19905	15.50	11.70	12.96	11.98	10.01
185	1608	Die.	18770	1620	6	4.49x5.32	504.5	2200	187.55	1000	192.38	167.72	6.18	18318	17.35	14.19	15.21	14.34	12.40
4-225	1558	Die.	24140	0	8	4.50x5.00	636	2600	195.65	1002	195.65	170.57	5.47	22865	15.60	12.06	13.64	12.42	10.44
4-270	1559	Die.	30650	0	6	4.75x6.00	638	2100	239.25	1000	242.30	211.70	6.60	27180	16.69	13.60	14.53	13.53	11.90
Yanmar																			
YM226D	1442	Die.	3380	1080	3	2.95x3.35	68.7	2600	19.42	540	17.87	16.14	4.78	2073	15.07	11.67	11.92	10.93	9.26
YM276D	1443	Die.	4110	1405	3	3.31x3.35	86.2	2600	23.00	540	22.82	18.93	5.78	2412	14.35	11.06	11.08	10.57	8.90
YM336D	1444	Die.	5020	1615	3	3.31x3.54	91.3	2600	26.98	540	25.63	23.00	6.28	3086	14.27	11.32	11.39	10.66	9.64
Zetor																			
5245/5211	1571	Die.	7295	385	3	4.02x4.33	164.6	2200	42.51	540	40.10	38.44	5.79	5955	16.56	13.17	14.59	13.83	12.10
6245/6211	1601	Die.	8535	885	4	3.94x4.33	211	2200	53.09	540	50.23	47.43	5.57	6332	16.06	13.04	13.84	13.34	11.50
7245/7211	1572	Die.	8565	725	4	4.02x4.33	219	2200	58.28	540	54.91	52.52	5.95	6356	16.82	13.51	14.36	13.90	12.33
7745/7711	1602	Die.	10360	2455	4	4.02x4.72	239	2200	65.74	540	62.17	57.56	6.63	7484	17.01	13.94	14.30	13.72	12.05